

# **SAMPLE MID-CAREER RETIREMENT PLANNING**

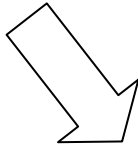


Career Transition Center  
Transition Center  
Shultz National Foreign Affairs  
Training Center  
US DEPARTMENT OF STATE

## **SEMINAR STAFF**

Catherine McCormick, Van Tabb, John Giusti, Marcie Sutton

## **DATES**

<b>DAY &amp; DATE</b> BLDG and ROOM TBA	<b>DAY &amp; DATE</b> BLDG and ROOM TBA
<p>8:15 – 8:45 <b>REGISTRATION</b></p> <p>8:45 - 9:00 <b>Welcome and Announcements</b></p> <p>9:00 – 10:15 <b>Life After Retirement</b> Speaker</p> <p><b>Annuities for Civil and Foreign Service Retirees</b> (attend the session for <u>your</u> retirement plan)</p> <p><b>Civil Service Annuities-CSRS</b> Room E2118 HR/RET Counselor</p> <p><b>Civil Service Annuities-FERS</b> Room C3116 HR/RET Counselor</p> <p><b>Foreign Service Annuities--FSPS</b> Room C3114 HR/RET Counselor</p> <p><b>Foreign Service Annuities--FSRDS</b> Room C3112 HR/RET Counselor</p> <p><b>Office of Retirement, HR/RET, US Dept. of State</b> <a href="http://intranet.hr.state.sbu/offices/RET/Pages/default.asp">http://intranet.hr.state.sbu/offices/RET/Pages/default.asp</a></p> <p>12:00 - 1:00 <b>LUNCH</b></p> <p>1:00 – 2:40 <b>Overview of Thrift Savings Plan</b> FRTIB Presenter Federal Retirement Thrift Investment Board <a href="http://www.frtib.gov">http://www.frtib.gov</a></p> <p>3:00 – 4:00 <b>Federal Long Term Care Insurance Program</b> LTCP, LLC Presenter Long Term Care Partners, LLC <a href="http://www.ltcpartners.com">http://www.ltcpartners.com</a></p>	<p>8:15 – 8:55 <b>REGISTRATION</b></p> <p>9:00 – 11:45 <b>Fundamental Aspects of Estate Planning</b> Presented by an Estate Planning Attorney</p> <p>11:45 - 1:00 <b>LUNCH</b></p> <p>1:00 – 4:00 <b>Financial Management</b> Presented by a Financial Planning Professional, CFP</p> <p></p> <p><b><u>PLEASE REMEMBER TO:</u></b></p> <p><b>--SIGN IN EACH MORNING AND AFTERNOON</b></p> <p><b>--PLEASE MAKE SURE WE HAVE THE BEST EMAIL ADDRESS TO SEND THE ONLINE SURVEY</b></p> <p><b><u>If your name is not on the sign in sheet</u></b> Check the FSI Registrar's Office Building F, Room 1245 Phone (703) 302-7137 or 7144 Fax (703) 302-7152</p> <p><b>Thank you</b></p> <p><b><u>To Receive Messages</u></b> Check the FSI Registrar's Office Building F, Room 1245 Phone (703) 302-7137 or 7144 Fax (703) 302-7152</p>



**DOS –Course materials are located on the SharePoint site:**  
<http://fsi.m.state.sbu/sites/tc/CTC/MCRPS/default.aspx>  
**(OTHER AGENCIES: check your email for materials)**